



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**August 19, 2019**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals  
FY 2019 annual targets  
FY 2019 actuals  
FY 2019 actuals as a percentage of annual targets  
FY 2019 actuals as a percentage of FY 2018 actuals  
FY 2020 actuals to date  
FY 2020 annual targets  
FY 2020 actuals as a percentage of FY 2020 annual targets

**The general target is 8.33% for FY 2020, July 1, 2019-June 30, 2020**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- This report includes the final revised performance measures table for FY 2019 as the Independent Living Services data was not available at the time of last month’s report. We met the target for unduplicated clients served, exceeded the unit of service target for both Homemaker and Personal Care Services but provided substantially less Escorted Transportation, Respite and Senior Companion services than anticipated. As previously noted, uncertainty about federal and state funding until the end of the fiscal year combined with staff vacancies prevented us from putting more clients on service.
- This report also includes the new performance measures table for FY 2020.
  - All existing clients from FY 2019 that continued to receive services in July are counted as “new” for the start of FY 2020.
  - There is one new performance measures this year: Amount of savings clients realize from participating in our benefits counseling service
  - There are two formatting changes:
    - The Nutrition and Independent Living survey results are now reported separately
    - Public outreach and education efforts are now reported in the Information and Referral/Assistance section
- The new DPHHS database is live and fairly buggy. Some of the July data may be incomplete. We hope to be able to capture anything that is missing next month.

- The # of unduplicated clients receiving Independent Living Services continues to be low as we are just now filling staff vacancies. It will likely be December before we begin to add any significant number of new clients.
- The # of individuals receiving Meals on Wheels is 20% higher than July of FY 2019. We have the capacity to serve more clients/meals and so are increasing our outreach for FY 2020.
- The # of seniors receiving Congregate Meals is 4% higher than July of FY 2019.
- The # of unduplicated Eagle Transit Dial-A-Ride riders is 3% lower than July of FY 2019. This is likely due to the restructuring of routes in Kalispell to support DAR riders to more easily use fixed route service. We are working on ways to capture the data to track the changes.
- The amount of Client Savings from Benefits Counseling is only \$1,424 for July. The amounts will increase substantially during Medicare Open Enrollment, which runs from October 15-December 7.
- The % of service recipients at moderate to high risk of institutionalization is on target.
- Overall client satisfaction with Nutrition and Independent Living Services is based on annual surveys that typically go out in March or April.
- We had 9 reported complaints related to Eagle Transit in July, which is more than the total number of complaints in FY 2019.
- Meals/Nutrition - Total meals served are up substantially over this time last year (920 meals), putting us slightly over target for the current year.
- **Transportation**
  - Although seasonal rides within Glacier are down substantially from July of last year, total rides are slightly higher, primarily due to increased ridership on Kalispell city routes.
  - Excluding seasonal rides within Glacier National Park, we provided 1,003 more rides than this time last year.
  - Ridership on the fixed and commuter routes are almost double the target, which is to be expected during the summer season, and just under target for paratransit/Dial-A-Ride.
  - The Orange Line achieved its highest ridership this month since its launch in January 2019.
- **Information and Referral/Assistance**
  - Contacts are slightly above target for the year and slightly above the pace of last year.
  - Outreach/Education are slightly above target for the year.
- **Independent Living Services**
  - The total “units of service” for all services combined are about half of what we would expect this time of year for the same reasons we are serving fewer unduplicated clients.
- **Benefits Counseling**
  - We are under target for the year and under the pace of last year, primarily due to staff vacancies, but also reporting “bugs” in the state’s new data system.
- **Ombudsman**
  - Ombudsman cases are below target also due to staff vacancies.

## **AOA Administration**

### ***Budget and Contracts***

- We will complete a final FY 2019 budget reconciliation and report for DPHHS once Finance has completed accruals.
- We submitted our FY 2020 budget to DPHHS and anticipate receiving a contract shortly.
- We submitted the 6-month financial report for the BEC grant in June.
- Staff submit financial reports monthly to DPHHS.

### ***Building***

- Nothing to report.

### **HR/Staff Development**

- We have one vacant Resource Specialist position we are currently in the process of filling.
- We filled the Veteran Care Coordinator and Receptionist positions.

### **State/Federal/Legislative Issues**

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa will not be able to attend the quarterly meeting in Helena in August.
  - Lisa continues to participate on two subcommittees that assist the DPHHS State Unit on Aging with contract administration and program improvement: Budget and Funding and Legal Services.
  - M4A is providing input and information to the Children and Families Interim Committee in support of its study of Senior and Long-Term Care.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expires at the end of September.
  - Lisa attended the annual n4a conference July 26-31 in New Orleans and participated in intensive workshops on securing contracts with Medicare Advantage Plans to provide beneficiaries with Older Americans Act and other services such as transportation.

### **AOA Advisory Council**

- The Council will meet next on September 12, 2019.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

- July 2019, 48 BEC ads per month on KGEZ
- July 2019, multi-media promotion of Congressman Gianforte's panel Fighting Fraud Workshop
- 7/1/19, monthly interview on KGEZ, 15,000
- 7/8/19, Daily Inter Lake daybook, AOA Advisory Council meeting, 17,500
- 7/14/19, Daily Inter Lake brief, "Meals on Wheels needs drivers," 17,500
- 7/15/19, presentation to ASSIST at KRMC, 20
- 7/17/19, Hungry Horse News, "Medicare and Benefits Info at Canyon Clinic," 4,200
- 7/19-23/19, Daily Inter Lake daybook, Medicare 101, 17,500
- 7/23/19, Medicare 101 class, 12
- 7/24/19, presentation at quarterly I&A staff training Area VI and IX, 20
- 7/25/19, BEC outreach in Hungry Horse at the Community Clinic, 48
- 7/31/19, SMP outreach at Fighting Fraud workshop, 35

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - 5-Year Transportation Development Planning Grant
    - We have talked/met with several groups to gauge community interest in and support of an integrated transit system serving Glacier National Park and the surrounding gateway communities, including City of Kalispell staff, Montana West Economic Development, the Kalispell Downtown Association, Discover Kalispell/Convention

and Visitor Bureau, Glacier Park International Airport, the Glacier Conservancy, City of Whitefish staff, Xanterra, and management of multiple hotels.

- We submitted a letter to Glacier Park International Airport in support of their effort to secure federal funding for airport expansion. The grant requires them to partner with public transit and other transportation to ensure passengers can reach other destinations.
  - FY 2019 fourth quarter vehicle report and Winter Use Maintenance report have been submitted. The program and financial reports will be submitted in mid-September once the county has closed its books.
- Outreach/Education/Media/Special Events:
  - As required by federal regulations, a monthly ad ran in the Daily Inter Lake in May and June.
  - On 7/17/19, we ran the GNP Commuter schedule in the Flathead Beacon
  - We promoted the GNP Commuter with onsite visits to the 10 Kalispell hotels on the route and distributed schedules at the hotels
  - We promoted the GNP Commuter on KGEZ.
- Operations:
  - Nothing to report.
- Staff Development/Training:
  - Nothing to report.
- Transportation Advisory Committee (TAC)
  - The TAC met on August 1<sup>st</sup>. The main agenda item was a review and discussion of lessons learned from the trip to Acadia National Park and implications for our system.
- Glacier National Park
  - Commuter service from Kalispell to the Park began on July 1<sup>st</sup>. We provided 1,103 rides for the month.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- We continue to average 90-100 diners per day at the South Campus.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- I&A/Benefits Counseling/BEC:
  - We are in the process of filling a vacant Resource Specialist position.
  - We are working on new outreach strategies to help us meet our grant targets.
  - Rep. Gianforte's staff were very pleased with the work we did to promote the Fighting Fraud workshop and with the resulting turnout and said they planned to use the report we gave them as an example of how to market future events.
- Veteran Directed HCBS Program:
  - Staff have attended training at both Missoula Aging Services and the Area VI Agency on Aging.
  - To complete training and allow for a "warm hand off" of clients from Area VI to us, we've pushed the final transition date to October 1<sup>st</sup>.
  - There are currently 26 enrolled veterans.
- Independent Living Services:
  - We are reviewing processes and procedures, including evaluating the effectiveness of the sliding fee scale system.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lakeside Chapel has hired a new pastor and is working to find a site manager so they can resume congregate and home-delivered meal service. AOA staff/volunteers continue to manage the home delivered meals in the interim.
- Whitefish Community Center is working with Nutrition staff regarding meal service options during the repair of the Center.
- Whitney is working with the North Valley Senior Center in Columbia Falls regarding new railing on the entry ramp.
- We continue to work with all stakeholders regarding the Bigfork Community Center.



# August 2019 Report: Performance Measures Tables - July 2019 stats (FY 2020)

8.33%

| MEASURE   | FY 2018<br>Actuals | FY 2019<br>Target | FY 2019<br>Actuals | FY 2019 %<br>of Target | FY 2019 as<br>% FY 2018 | July    | Total Last<br>Report | Total/Avg.<br>to Date | FY 2020<br>Target | % Target |
|---|--------------------|-------------------|--------------------|------------------------|-------------------------|---------|----------------------|-----------------------|-------------------|----------|
| # Receiving Independent Living Services                                     | 110                | 98                | 98                 | 100%                   | 89%                     | 47      | 0                    | 47                    | 119               | 39%      |
| # Receiving Meals on Wheels   | 374                | 465               | 401                | 86%                    | 107%                    | 225     | 0                    | 225                   | 465               | 48%      |
| # Seniors Receiving Congregate Meals  | 1,404              | 1,200             | 1,538              | 128%                   | 110%                    | 569     | 0                    | 569                   | 1,200             | 47%      |
| # Eagle Transit DAR Unduplicated Riders                                     | 331                | 450               | 333                | 74%                    | 101%                    | 147     | 0                    | 147                   | 450               | 33%      |
| Client Savings from Benefits Counseling                                     | N/A                | N/A               | N/A                | N/A                    | N/A                     | \$1,424 | \$0                  | \$1,424               | \$400,000         | 0%       |
| % of IL Service Recipients at Moderate to High Risk of Institutionalization | 92%                | 88%               | 93%                | 106%                   | 101%                    | 88%     | 0%                   | 88%                   | 88%               | 100%     |
| Per Meal Cost of Nutrition Services   | \$6.29             | \$7.00            | \$6.80             | 97%                    | 108%                    | \$4.33  | \$0.00               | \$4.33                | \$7.00            | 62%      |
| % Overall Satisfaction with Nutrition Services from Annual Survey           | 97%                | 95%               | 97%                | 102%                   | 100%                    | N/A     |                      | 0%                    | 97%               | 0%       |
| % Overall Satisfaction with Independent Living Services from Annual Survey  | 90%                | 95%               | 97%                | 102%                   | 108%                    | N/A     |                      | 0%                    | 90%               | 0%       |
| Maximum annual number of transportation complaints                          | 12                 | 36                | 4                  | 11%                    | 33%                     | 9       | 0                    | 9                     | 25                | 36%      |
| WORKLOAD INDICATOR  | FY 2018<br>Actuals | FY 2019<br>Target | FY 2019<br>Actuals | FY 2019 %<br>of Target | FY 2019 as<br>% FY 2018 | July    | Total Last<br>Report | Total/Avg.<br>to Date | FY 2020<br>Target | % Target |
| <b>Nutrition</b>  |                    |                   |                    |                        |                         | July    |                      |                       |                   |          |
| Total Meals   | 80,639             | 80,000            | 78,515             | 98%                    | 97%                     | 7,110   | 0                    | 7,110                 | 80,000            | 9%       |
| MOW   | 47,409             |                   | 46,658             | N/A                    | N/A                     | 4,167   | 0                    | 4,167                 |                   |          |
| Social Dining (Congregate)  | 33,230             |                   | 31,857             | N/A                    | N/A                     | 2,943   | 0                    | 2,943                 |                   |          |
| Nutritional Assessments Conducted   | 1,846              | 2,000             | 1,858              | 93%                    | 101%                    | 434     | 0                    | 434                   | 2,000             | 22%      |
| <b>Transportation</b>   |                    |                   |                    |                        |                         | July    |                      |                       |                   |          |
| Total Ride Count  | 99,104             | 90,000            | 116,017            | 129%                   | 117%                    | 12,527  | 0                    | 12,527                | 100,000           | 13%      |
| Paratransit/Dial-A-Ride Count   | 31,645             | 30,000            | 26,784             | 89%                    | 85%                     | 2,156   | 0                    | 2,156                 | 30,000            | 7%       |
| City, Commuter and Other Ride Count   | 67,459             | 60,000            | 89,233             | 149%                   | 132%                    | 10,371  | 0                    | 10,371                | 70,000            | 15%      |
| Eagle Transit Outreach/Special Events                                       | 42                 | 15                | 31                 | 207%                   | 74%                     | 4       | 0                    | 4                     | 25                | 16%      |
| <b>Information and Referral/Assistance</b>                                  |                    |                   |                    |                        |                         | July    |                      |                       |                   |          |
| Outreach, Information, Referral Contacts                                    | 19,429             | 18,000            | 26,014             | 145%                   | 134%                    | 1,803   | 0                    | 1,803                 | 18,000            | 10%      |
| Outreach/Education/Media Efforts  | 116                | 120               | 129                | 108%                   | 111%                    | 12      | 0                    | 12                    | 120               | 10%      |
| <b>Independent Living</b>   |                    |                   | 66%                |                        |                         | July    |                      |                       |                   | 4%       |
| Homemaker Units of Service  | 2,005              | 1,324             | 1,433              | 108%                   | 71%                     | 141     | 0                    | 141                   | 2,000             | 7%       |
| Escorted Transportation Units of Service                                    | 2,314              | 1,391             | 886                | 64%                    | 38%                     | 81      | 0                    | 81                    | 2,174             | 4%       |
| Respite Units of Service  | 2,079              | 3,250             | 1,793              | 55%                    | 86%                     | 117     | 0                    | 117                   | 2,857             | 4%       |
| Community Support/Senior Companion Units of Service                         | 1,310              | 1,176             | 508                | 43%                    | 39%                     | 30      | 0                    | 30                    | 1,471             | 2%       |
| Personal Care Units of Service  | 231                | 65                | 146                | 225%                   | 63%                     | 12      | 0                    | 12                    | 174               | 7%       |
| <b>Benefits Counseling</b>  |                    |                   |                    |                        |                         | July    |                      |                       |                   |          |
| Benefits Counseling Hours of Service  | 502                | 450               | 1,193              | 265%                   | 238%                    | 17      | 0                    | 17                    | 500               | 3%       |
| <b>Ombudsman</b>  |                    |                   |                    |                        |                         | July    |                      |                       |                   |          |
| Ombudsman consults/cases opened   | 1,250              | 1,100             | 1,116              | 101%                   | 89%                     | 62      | 0                    | 62                    | 1,000             | 6%       |